BILL ANALYSIS & TRACKING SYSTEM

BATS uses standard tools to support agency request legislation and bill tracking processes.

Search

Use search to find and select items based on information in the first column of a list.

✓ You can search using the bill number or text in the bill short title if it is the first column of a list. If you search using text in the bill short title, include the wildcard * (asterisk). For example, use *dog to search on bills that include 'dog' in the bill short title.

➔ In this example, we search for bills with 'dog' in the bill short title.

⚓ Search Results ˅   *dog   🔍

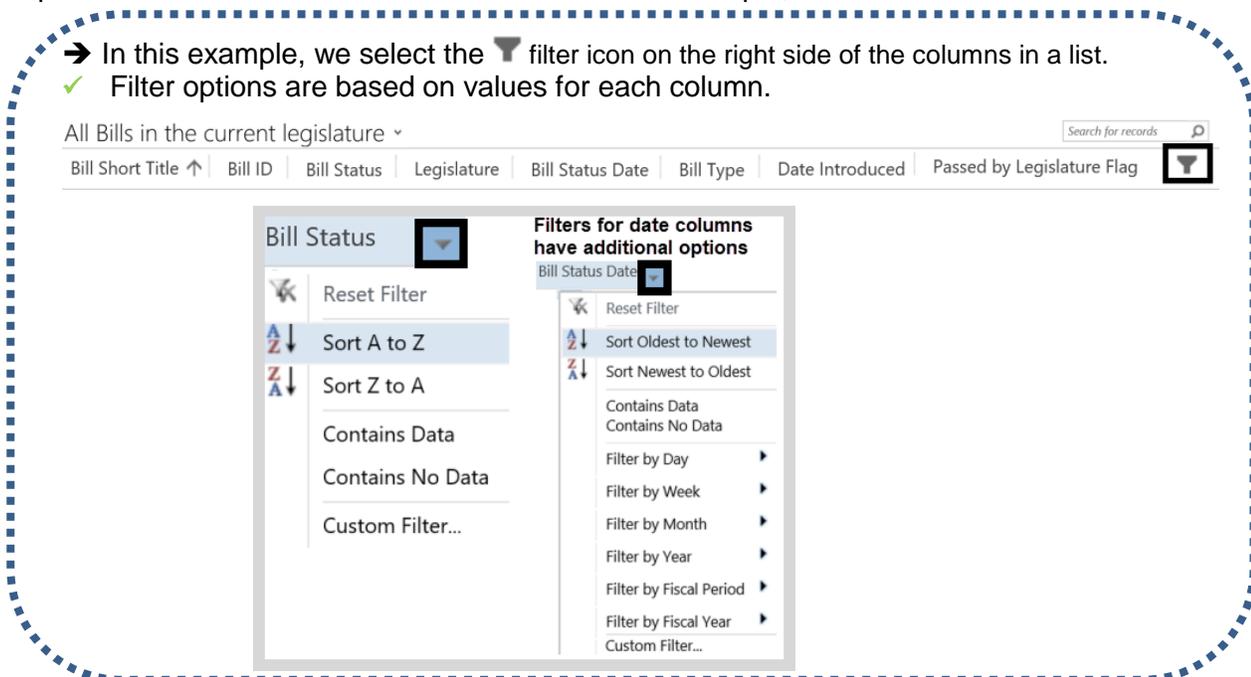| ✓	Bill Short Title ↓	Bill ID	Bill Status
	5812 - Unlawful dog tethering	SB 5812	SLaw & Justice
	1018 - Breed-based dog regulations	SHB 1018	HRules

Filter

Use a filter to narrow the results in a list. For example, the filter option is helpful if you need to quickly narrow a list of bills by short title or status or another column in a list.

✓ When you select the ▼ filter icon, you can narrow results using options for each column in the list. Filter options are based on values for each column. For example, a date column will have additional options.

➔ In this example, we select the ▼ filter icon on the right side of the columns in a list.
✓ Filter options are based on values for each column.

All Bills in the current legislature ˅   Search for records 🔍

| Bill Short Title ↑ | Bill ID | Bill Status | Legislature | Bill Status Date | Bill Type | Date Introduced | Passed by Legislature Flag | ▼ |

Bill Status ▼

| ⅏ Reset Filter |
| ⊼↓ Sort A to Z |
| ⊻↓ Sort Z to A |
| Contains Data |
| Contains No Data |
| Custom Filter... |

Filters for date columns have additional options

Bill Status Date ▼

| ⅏ Reset Filter |
| ⊼↓ Sort Oldest to Newest |
| ⊻↓ Sort Newest to Oldest |
| Contains Data / Contains No Data |
| Filter by Day ▶ |
| Filter by Week ▶ |
| Filter by Month ▶ |
| Filter by Year ▶ |
| Filter by Fiscal Period ▶ |
| Filter by Fiscal Year ▶ |
| Custom Filter... |

Lookup
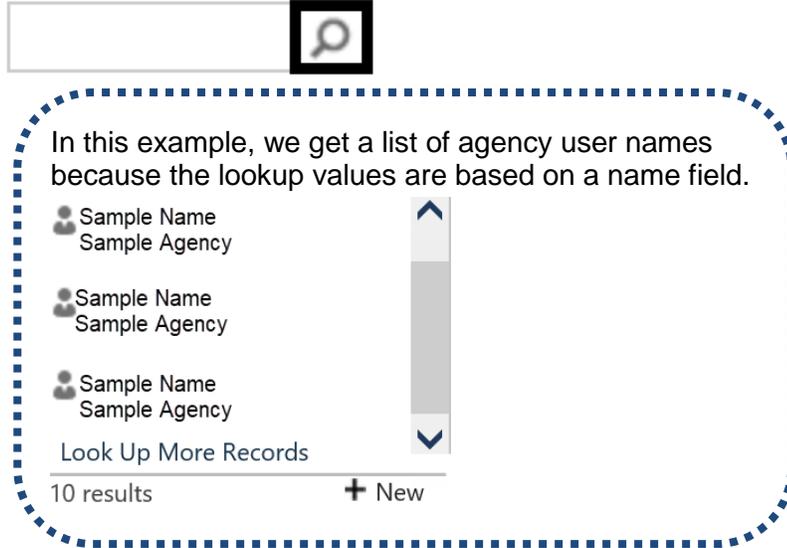
Use lookup to find and select/remove items for a list.

✓ Lookup options are based on values for a field. For example, use lookup to find an agency user name.

1. Select: 🔍 Lookup icon.
➔ You can also input full or partial lookup criteria to narrow results.
 	
Sample 🔍
 	
➔ BATS will display a list of items based on the field.
	In this example, we get a list of agency user names because the lookup values are based on a name field.
	
	👤 Sample Name
	  Sample Agency
	
	👤 Sample Name
	  Sample Agency
	
	👤 Sample Name
	  Sample Agency
	
	Look Up More Records
	
	10 results ✚ New

2. Select: LookUpMoreRecords. ➔ BATS will display a list of items and criteria options based on the lookup field.	**Look Up More Records**
3. Input: Criteria. **4. Select:** 🔍 Lookup icon. ➔ BATS will display a list of items.	In this example, we input criteria based on internal contacts because we want to use lookup to find an agency user name. Enter your search criteria. **Look for** Internal Contact ▾ **Look in** Local Business Users ▾ **Search** Sample 🔍
5. Select: Item. **6. Select:** Add.	In this example, we select the name and select add. | Full Name ↑	Business Unit
✓ Sample Name	123 Sample Agency | New **Add** Cancel Remove Value

Advanced Find

Use advanced find to search for records, activities, or views.
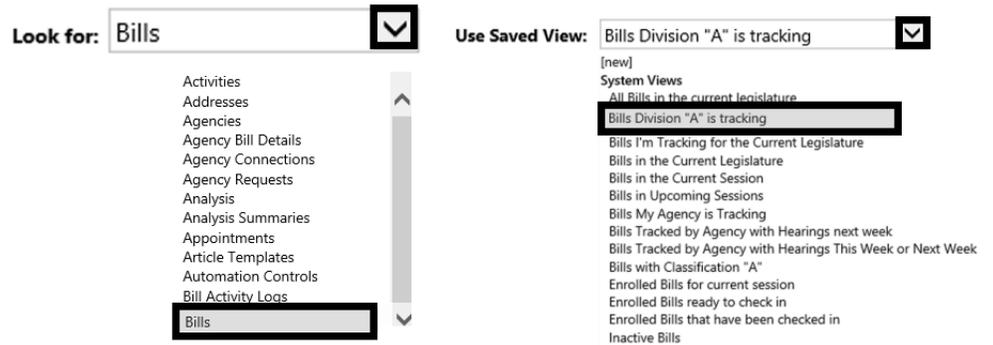
✓ If you need a custom view, use advanced find and save the results to create a personal view.

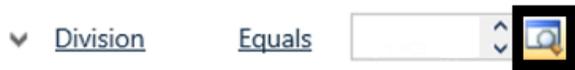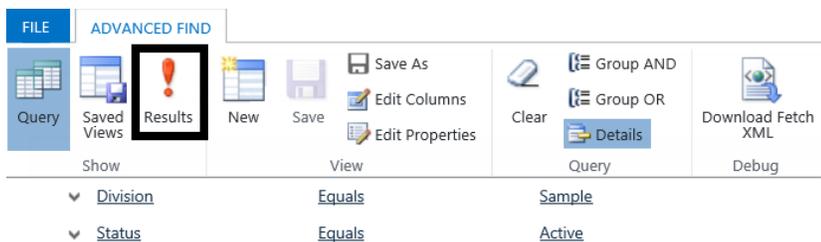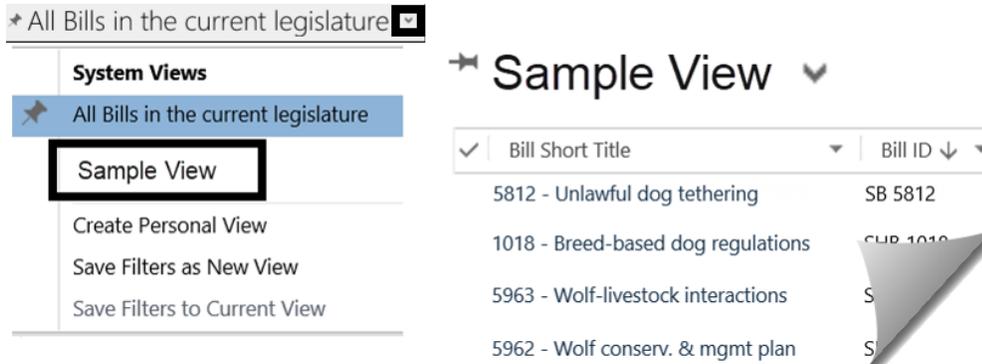|	
1. **Select:** Advanced Find (top banner area). ➔ BATS will display advanced find options with a list of items you can use for the advanced find.	**BILL ANALYSIS & TRACKING SYSTEM** BATS ⌄ Dashboards > 🔍 🕓 + ▽
2. **Select:** Item to look for. 3. **Select:** Saved View. ➔ BATS will display search criteria based on the saved view so that you can modify the criteria. ➔ If you select new, BATS will display a template so that you can select criteria. It is usually faster to use a saved view and modify the criteria.	In this example, we select bills from the list of available items to look for and a system view to use as a template for our search. Look for: Bills Activities Addresses Agencies Agency Bill Details Agency Connections Agency Requests Analysis Analysis Summaries Appointments Article Templates Automation Controls Bill Activity Logs Bills Use Saved View: Bills Division "A" is tracking [new] **System Views** All Bills in the current legislature Bills Division "A" is tracking Bills I'm Tracking for the Current Legislature Bills in the Current Legislature Bills in the Current Session Bills in Upcoming Sessions Bills My Agency is Tracking Bills Tracked by Agency with Hearings next week Bills Tracked by Agency with Hearings This Week or Next Week Bills with Classification "A" Enrolled Bills for current session Enrolled Bills ready to check in Enrolled Bills that have been checked in Inactive Bills
4. **Select:** Criteria. ➔ Use 🔍 lookup to find criteria.	In this example, we hover the cursor over the criteria to use 🔍 lookup to select different criteria for the search. ⌄ Division Equals [ ] 🔍
5. **Select:** Criteria.	In this example, we select criteria to modify the division. ✓ Name Sample Selected records: Test Division Select Remove Select Remove Selected records: Test Division Sample Add Cancel
6. **Select:** Results. ➔ BATS will display results for the advanced search based on the criteria. ➔ Use the save as option to save the advanced find and create a personal view.	FILE ADVANCED FIND Query Saved Views Results New Save Save As Edit Columns Edit Properties Clear Group AND Group OR Details Download Fetch XML Show View Query Debug ⌄ Division Equals Sample ⌄ Status Equals Active

Views

Use a view to find and display a list of items. For example, you can use a system view to quickly display a list of bills in the current legislature.

✓ System views are created and maintained by BATS support staff so you cannot modify them.
✓ Personal views are created and maintained by you. For example, if you need a custom view, use advanced find and save the results to create a personal view.

➔ In this example, we select a different view to display a sample list of bills.

* All Bills in the current legislature ▾

System Views

📌 All Bills in the current legislature

Sample View

Create Personal View

Save Filters as New View

Save Filters to Current View

📌 **Sample View** ⌄

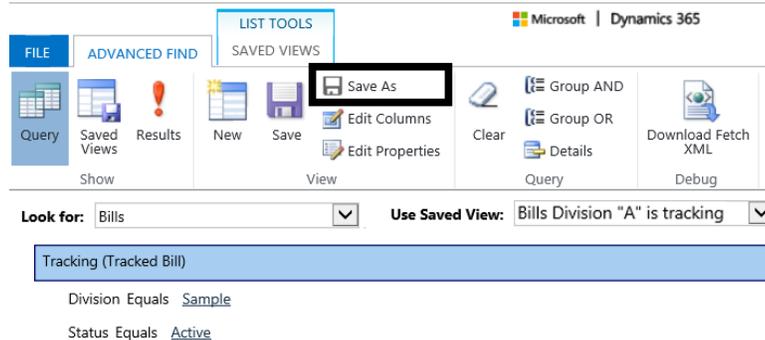| ✓	Bill Short Title ▾	Bill ID ↓ ▾
	5812 - Unlawful dog tethering	SB 5812
	1018 - Breed-based dog regulations	SHB 1018
	5963 - Wolf-livestock interactions	S
	5962 - Wolf conserv. & mgmt plan	S

Create Personal View

Use advanced find to search for records, activities, or views then save the results to create a personal view.
✓ You can also use a saved view to create a new view.

1. Select: Save as.

➔ **Caution!** Select save as if your advanced find is based on a saved view. This will create a new view instead of updating the existing view.

In this example, we select save as because the advanced find is based on a saved view and we want to create a new view.

Microsoft | Dynamics 365

LIST TOOLS

FILE   ADVANCED FIND   SAVED VIEWS

Query | Saved Views | Results | New | Save | **Save As** | Edit Columns | Edit Properties | Clear | Group AND | Group OR | Details | Download Fetch XML

Show | View | Query | Debug

Look for: Bills ▾   **Use Saved View:** Bills Division "A" is tracking ▾

Tracking (Tracked Bill)

Division Equals Sample

Status Equals Active

2. Input: Name. This is the name for the new view.

3. Input: Description.

4. Select: Save.

➔ BATS will display the new personal view.

Save as new View
The view is stored in the list of saved views.

Name *

Bill Tracking for Division Sample
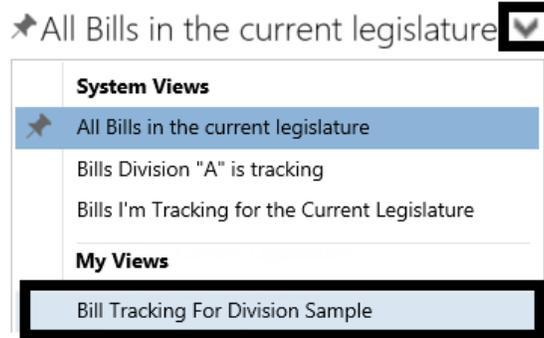
Description

Bill tracking for agency division sample

Save   Cancel

Change Personal View

Use the standard editing tools to change a personal view. For example, you can edit columns to change the fields that are displayed with the view and you can edit properties to change the title or description of the view.

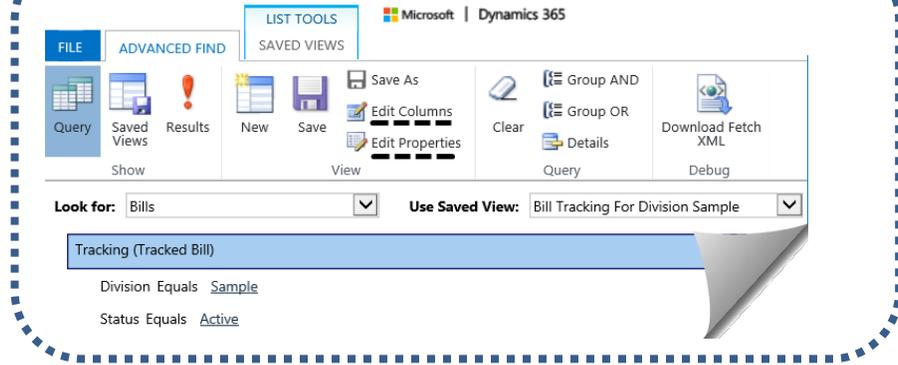|	
1. Select: View. This is the view you want to change.	In this example, we select a personal view from a bill tracking page.

**All Bills in the current legislature**

System Views

All Bills in the current legislature

Bills Division "A" is tracking

Bills I'm Tracking for the Current Legislature

My Views

Bill Tracking For Division Sample

2. Select: Advanced Find icon (top banner area). ➔ BATS will display advanced find options for the view.	**BILL ANALYSIS & TRACKING SYSTEM** BATS Dashboards

In this example, we can edit columns and edit properties.

LIST TOOLS

Microsoft | Dynamics 365

FILE ADVANCED FIND SAVED VIEWS

Query | Saved Views | Results | New | Save | Save As | Edit Columns | Edit Properties | Clear | Group AND | Group OR | Details | Download Fetch XML

Show | View | Query | Debug

Look for: Bills **Use Saved View:** Bill Tracking For Division Sample

Tracking (Tracked Bill)
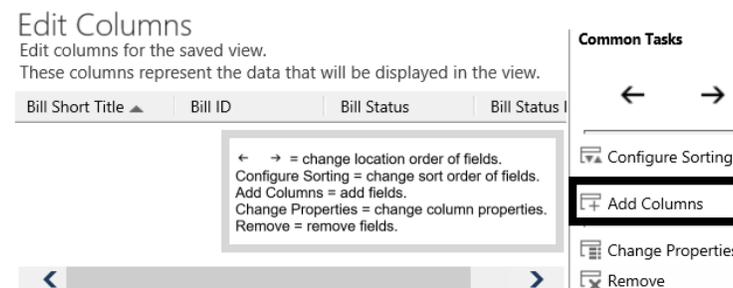
Division Equals Sample

Status Equals Active

3. Select: Edit Columns. ➔ BATS will display the columns (fields) in the view with common tools you can use to edit columns.	LIST TOOLS ADVANCED FIND SAVED VIEWS Saved Views	Results	New	Save	Save As	**Edit Columns**	Edit Properties
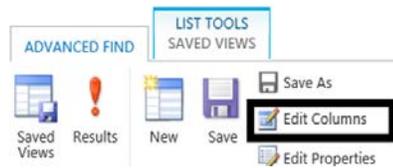
4. Select: Add Columns. ➔ BATS will display the columns (fields) available for the view.	In this example, we select add columns because we want to display additional fields in our view.

Edit Columns

Edit columns for the saved view.
These columns represent the data that will be displayed in the view.

Bill Short Title ▲	Bill ID	Bill Status	Bill Status

Common Tasks

← →

← → = change location order of fields.
Configure Sorting = change sort order of fields.
Add Columns = add fields.
Change Properties = change column properties.
Remove = remove fields.

Configure Sorting

Add Columns

Change Properties

Remove

5. **Select:** Checkbox next to the columns you want to add.

6. **Select:** OK.

➔ BATS will add the column (field). You can use the common tools to change the location or sort order if needed.

In this example, we use the bill record type and select the checkbox next to created by to add the field to our view.

Add Columns
Select the columns to add to this view.

Record Type   Bill

	Display Name ▲	Name	Type
☑	Created By	createdby	Lookup
☐	Created By (Delegate)	createdonbehalfby	Lookup
☐	Created On	createdon	Date and Time

OK   Cancel

7. **Select:** OK.

OK   Cancel

8. **Select:** Save.

➔ Use results if you want to display information in the view.

➔ Use save as if you want to create a new view.
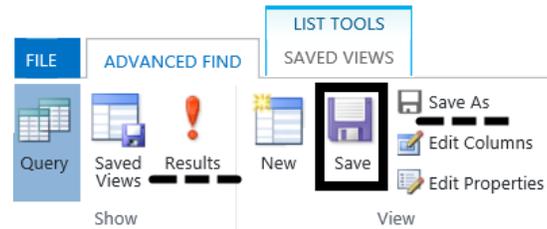
LIST TOOLS

FILE   ADVANCED FIND   SAVED VIEWS

Query   Saved Views   Results   New   Save   Save As   Edit Columns   Edit Properties

Show   View

Share Personal View

Use advanced find to share your view with other BATS users in your agency.

✓ When you share a view, you can also manage permissions for the view. For example, you can share a view with read only permissions or you can allow someone else to change the view.
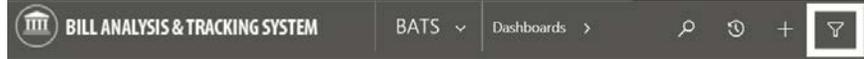
1. **Select:** ▽ Advanced Find icon (top banner area)

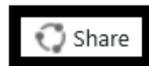2. **Select:** Saved Views.
➔ BATS will display a list of saved views.
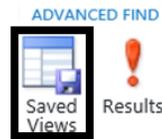
3. **Select:** View.
4. **Select:** List Tools Saved Views.

In this example, we select a sample view from my active saved views and select the tools for saved views.

5. **Select:** Share.
➔ BATS will display common tools for sharing a view.

6. **Select:** Checkbox next to permission level.
7. **Select:** Share.
➔ Use Add User/Team to find users or teams to add to the list.

In this example, we select permission levels to share the saved view.

Assign Personal View

Use advanced find to assign a personal view. For example, you can assign your view to another BATS user in your agency. Some agencies use this when a user is transitioning to another job or retiring because they can assign ownership of their views to someone else on their team.

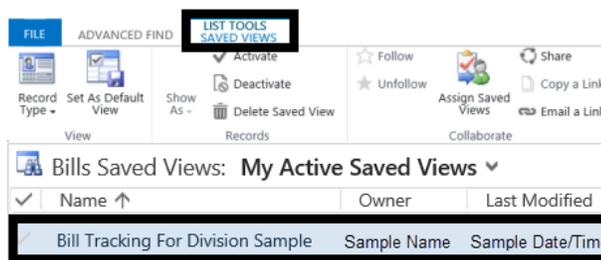1. **Select:** Advanced Find icon (top banner area).
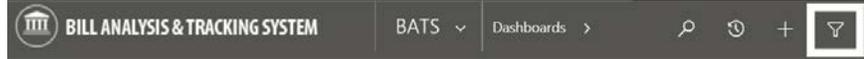
2. **Select:** Saved Views.
➔ BATS will display a list of saved views.

3. **Select:** View.
4. **Select:** List Tools Saved Views.

In this example, we select a sample view from my active saved views and select the tools for saved views.

5. **Select:** Assign Saved Views.

6. **Select:** Assign to.
7. **Select:** User or Team.
➔ Use 🔍 lookup to find the user or team.
8. **Select:** Assign.
➔ **Caution!** When you select assign, you will not be the owner of the view. If you need to use the view, the new owner can share it with you or assign it to you.